

From: [Tony A. Rose](#)
To: [Kent Smith](#)
Subject: Creating a Legacy That is More Than Money
Date: Thursday, July 23, 2015 8:49:18 AM

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Dear Kent,

A wealth transition should be about more than preserving wealth ... it should also be about identifying and building a family that embraces the values, relationships, knowledge, processes, and abilities that led to wealth creation in the first place.

[Download](#) our complimentary whitepaper and learn how to make meaningful wealth transitions that draw your family closer and create sustainable wealth.

Learn how to:



- Close the gaps in knowledge, ability, or values that might otherwise jeopardize your wealth.
- Enrich your “human capital” by creating deep and lasting bonds within your family that are strengthened—and never destroyed—by wealth.
- Replicate the “structural capital” and processes that supported the original wealth creation.

Your family’s financial capital will thrive when you identify and enrich your family’s human, intellectual, social, and structural capitals in the estate-planning process.

Pass your legacy to your heirs with our Values-based Wealth Transition Model. Click on the image to download our whitepaper and start your transition to wealth preservation and protection.

Sincerely,

Tony A. Rose, CPA, Managing Partner
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